

# An Informal History (and Possible Future) of Digital Reference

by Joseph Janes

## Virtual Reference Services

The first “digital reference” transaction, whatever it might have been, is sadly lost to the mists of digital time. Depending on your definition, it was more than likely a one-off message, sent to some library that had early email capability from a user who thought of firing off a question to a librarian on a whim. (In a looser sense, the telex-based statewide and regional reference centers of the mid-20th century might qualify as well.) It’s unlikely to have been part of anything approaching what we think of today as a service, with dedicated staffing, marketing or assessment. It probably came as a momentary surprise, followed by a shrug on the part of the librarian who then dutifully and unremarkably went on with answering the question.

As such, what we now think of as digital reference was likely inevitable. Give users and libraries the tools by which to communicate, and those tools will get used for reference transactions. In the 19th century, reference by mail correspondence was not unusual, and as early as the mid-1920s, reference librarians were incorporating telephones into their work. In much the same spirit, and in fact raising many of the same questions, issues and objections, the same happened with email and other allied networked technologies at the end of the century.

Since that first email message, a number of other technologies have been tried and used in the service of reference work. Web forms, so-called “chat” clients – actually derived from customer-service phone bank technology – and instant messaging of various flavors have been the primary vehicles employed, although experiments with environments such

as MOOs (notably at the Internet Public Library) and more recent virtual-reality systems such as Second Life have been tried as well.

Many of these candidate technologies found homes and became ingrained in the practice of digital reference. There are a number of other options, of course: SMS or text messaging, for example, or incorporation into a social networking site such as FaceBook or MySpace, both of which have been attempted. With scarce time and resources, however, it is not prudent, not to mention maddening and counterproductive, to be forever chasing new technologies. Instead, we have the stand-by tools, and others have yet to make much of a dent in the professional repertoire.

An aside on nomenclature – almost since the beginning, there’s been no firm consensus on whether to call this general area “digital reference” or “virtual reference” (“electronic reference” and others were, happily, abandoned early on). For a while it seemed that *virtual* was used to refer to synchronous services such as chat, and *digital* was used for the asynchronous/email world, but even that distinction wasn’t consistently maintained. For our purposes, “digital reference” will suffice, but no specific meaning is intended therein.

It’s also worth remarking that other services, not based in libraries, have used similar or related ideas or technologies to answer questions. Google attempted, then abandoned, an answer service; Yahoo’s service continues with some success. A number of professional societies and organizations, schools, corporations and even individuals mounted ask-an-expert services (many of which sheltered under the umbrella of the Virtual Reference Desk endeavor at Syracuse University) in specific subject areas.

Just because the use of networked technology in reference work was inevitable doesn’t mean it was an add-water-and-stir proposition. A number of complicated and occasionally frustrating issues arose as services grew and developed and took form.

Joseph Janes is with the Information School at the University of Washington, Box 325840, Seattle WA 98195. Email at [jwj@at.u.washington.edu](mailto:jwj@at.u.washington.edu)

**Contending with the vagaries of licensing agreements** has been a continuing challenge. How much, if any, material from a licensed database or work can be sent via email or quoted in a chat message with a user who may or may not be part of your legal service population or community? Obviously, this issue quickly gets us into authentication, privacy and confidentiality territory, as well.

**Appropriate and high-quality training materials** were needed to help staff – often highly experienced in the ways of print-based reference tools and face-to-face work – learn not only about the Internet, web searching and networked sources, but also about the tools used in implementing the service. Staff needed to move beyond a “that’s not reference” mindset, but incorporation of peer-review and other assessment approaches often compounded the adoption problem.

**A common attitude developed**, especially in asynchronous environments, that the lack of a reference interview, at least in familiar form, made digital reference either considerably more difficult or, in some cases, invalid as professional practice. Development of web forms, scripts to support synchronous systems, protocols and perspectives on what an “interview” might be in this domain soon followed.

**Staffing levels, patterns and expectations** also were discussed. Was it better to do digital transactions while working on the physical reference desk or elsewhere? Were separate or different information resources needed? Which staff would be particularly well (or poorly) suited for this work?

**Marketing of digital reference services** has been critical to their success. Early experimental or pilot projects would be developed and slipped onto library websites, often buried multiple levels down with disclaimers and obtuse policy statements, warning all who tried to use them to beware. Media campaigns, well-designed web presences, even viral marketing approaches, have been developed and fruitfully deployed in a large number of venues.

A number of these issues were often raised or thrown into sharp relief due to the rise of collaborative services, a reasonable outgrowth considering the nature of libraries and reference services (collaboration between library reference services was not uncommon 75 years ago). Such collaboration has manifested on many levels, from broad-based national or international

projects (the Collaborative Digital Reference Service of the Library of Congress and the 24/7 Reference consortium in Southern California – both of which morphed into OCLC’s QuestionPoint) to national, regional, statewide, provincial, local and other models.

Collaborative work proved to be productive and satisfying on many fronts, giving the opportunity to provide service over longer periods of time (often taking advantage of placements in various time zones around the world) or in broader subject areas. Appropriately routing questions to services best able to respond to them can be problematic in some circumstances, however. In addition, two challenges related to and born of the deep service orientation of reference librarianship have sometimes impeded their growth and success.

Some librarians, after years of training and experience dedicated to seeing a question through to its conclusion, proved unwilling or uncomfortable with the idea of forwarding a question on to a collaborative service, almost as though it were an admission of personal defeat or deficiency. Also, many questions have a local component, either a mechanical one referring to a client’s account, circulation, library hours or policy, or a question with a distinctly local subject and flavor. Such questions are often seen to be less well responded to by an answerer not part of the local institution or community, which can be frustrating and even unhelpful or just plain wrong.

In the main, though, exploration and adoption of digital reference tools and techniques followed a fairly familiar pattern. First, a rush of zealots, people who immediately recognized that these ideas had potential merit; then, generations of the willing; and finally, stragglers who came to appreciate that merit or who felt somehow compelled to try it, accompanied as is so often the case by groups of doubters and even saboteurs.

By now, a large number of libraries and librarians have at least tried something. Early pilot and experimental projects were followed by fledgling services, many of which became more and more deeply ingrained into the fabric of reference work. “Institutionalization” became a rallying cry for many, who believed that until “digital reference” became part of mainstream reference, it would always be seen as separate – an add-on, a

luxury and, ultimately, different and thus dispensable. This demand for integration raised a series of issues and questions regarding management, funding and sustainability for these services, which of course would be the case with any new or innovative work.

As challenging and occasionally provocative as these issues and questions have been, it can't truly be said that any of them were of high intellectual or theoretical import. It is true that providing assistance to people with whom there is no verbal connection (as with phone or face-to-face reference work) has led to interesting questions about how to proceed when it may not be possible to understand the information need with any great certainty or to interact in a thorough way. Reorienting reference work to focus more on digital and freely available networked resources, under the theory that most clients who approach a digital service would prefer digital responses, has also provoked considerable discussion. By and large, however, there is not a great deal here that is all that surprising or unexpected.

Which leads to an obvious question: Why should anybody care that much about this area? Isn't this just another example of technological adaptation in library work, in much the same vein as library automation, say, in a fairly predictable and workmanlike (if sometimes innovative) way?

Perhaps. It's overstating the case to say that the rise of digital reference over the last decade and a half is no more interesting than "library hand" giving way to the introduction of typewriters. It does, however, remain to be seen just how substantial a legacy digital reference will leave. Does this area stagnate and become background noise, necessary and dependable to the operation of a library but otherwise unremarkable? Or does it represent something novel and surprising?

Digital reference has never been – though it often seemed like it was – just about answering questions via email or instant messaging. Answering questions is how it started, but in fact there is a far more intriguing matter at its heart which has yet to be solved or appreciated for what it could be.

That matter is *scalability*. For its entire history, reference work has been piece work, one person at a time, one question at a time, individually tailored service and responses. In a strictly local and community-based organization, that makes perfect sense. Yes, there were attempts to ease the load and

broaden its reach; one thinks of sources such as the *New York Public Library Desk Reference* which were meant to collect the answers to common or popular questions, and many reference desks had card files or quick-answer sheets for the regular requests.

That kind of work, however, is very labor- and time-intensive and does not lend itself to scaling up to anything approaching the number of queries issued each day to any of the major search engines. Collaborative services were developed in part to address this, but unlike digital catalogs or collections or resources, digital reference services remain one-at-a-time propositions.

One option is that they stay that way. In this scenario, library digital reference services occupy a meaningful but rather small niche in the information-need-satisfying marketplace, akin to hand-built automobiles, custom-tailored clothing and so on. Not necessarily a luxury commodity, but not in any way meant for the large mass of information needs we now know exist on the Internet.

However, beyond scalability lies another, potentially even more important and valuable prospect. If digital reference can truly scale, using its resources to responded to ever-greater numbers of needs, then reference in general would be able to bid for true *centrality*, simultaneously woven into the fabric of libraries and the everyday information lives of their clients, reinforcing the importance of libraries and their services – and also the ability and even necessity of libraries to serve people beyond the walls of their physical and necessary buildings.

Scaling up could be one of the most visible and potentially fruitful ways to achieve that important goal and part of a long line of ways in which the concept of the library and the work of a library seep out of the building, joining branches, bookmobiles, outreach efforts, interlibrary loan, full-text access to databases, downloadable audio books and the like...even open stacks, browsing and borrowing privileges now taken so for granted.

When the true history of "digital" reference is written, the verdict on its success will hinge on how well it succeeded in its mission – to be incorporated not only in the institutional framework of libraries but also, and more crucially, in the mindset of its staff and the information lives of their clientele. ■